WinTen² Shelter Plus Care User Manual

This user manual is meant to provide guidance on the WinTen² Shelter Plus Care (S+C) program.

Shelter Plus Care (S+C) is a HUD program designed to provide funding for homeless people with disabilities. Specifically, S+C targets homeless who are mentally disabled or living with AIDS. Your agency can use the funding to subsidize rent for Public Housing, Section 8, and even TRACS housing, but the program manager must match the S+C housing subsidy (shelter) with equal dollars in supportive services (care) from outside agencies, such as job skill training, transportation, and medical services. At the end of each fiscal year, your agency must submit an Annual Progress Report to HUD. This report shows the amount of rent subsidy that each tenant received, along with the corresponding supportive services.

The WinTen² Shelter Plus Care (SPC) program enables you to track these supportive services by tenant and agency, providing you with all the data required to produce the Annual Progress Report. The program draws tenant data from the WinTen² Occupancy and Rent Calculation program to compile a separate database of S+C participants. It also maintains its own database of outside supportive service agencies. You can record individual instances of supportive services for each tenant in the participant database.

Setup

Participant Management

Reports

Setup Overview

All WinTen² programs have a variety of Setup options that control the program environment and govern many aspects of program operation. These options allow your agency to customize the programs to best meet your needs and make your job easier.

You should carefully plan and then implement your Setup options before using the Shelter Plus Care program. In addition, the administrator of your WinTen² programs should review your Setup options at least annually.

Agency and Color Settings

Status Codes

Outside Agencies

Caseworkers

Agency and Color Settings

On the Default Settings screen, you can enter your agency's contact or "return address" information, and set the program's interface color.

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1. Click SETUP on the **Main Menu screen** and then click DEFAULT SETTINGS on the **Setup Menu screen** that appears. The **Setup Shelter Plus Care screen** opens.

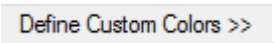
Agency Settings

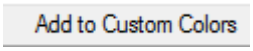
2. Click on the toolbar.
3. Enter your organization name, address, and contact information in the available fields.
4. Click to save and apply your changes.

Color Settings

The color you select here changes the interface of the program

5. Click on the toolbar and the **Color window** appears.
6. Select the box of the color you want.
7. Click OK to save and apply the color change. The color you select here will then display as the screen color of every screen in the program.

Hint: *To create your own custom color, click* 

. Click on the color gradient that appears until your custom color is achieved. Or, you can enter specific hue, saturation, lumination, red, green, and blue variants. Click 

to save the custom color for future use.

Note: A color setting, like any other setting, is only applied to the current data area. Many agencies use this feature to color code their data areas so users can tell at a glance what data area they're currently using.

Status Codes

Each participant in Shelter Plus Care's database can have a single status code assigned. Status codes are user-defined codes that enable you to filter reports for individuals who fit a certain criterion.

The Maintain Status Codes screen enables you to edit the statuses that Shelter Plus Care recognizes for individual participant records.

Setting Up Status Codes

1. Click SETUP on the **Main Menu screen** and then click STATUS CODE on the **Setup Menu screen** that appears. The **Maintain Status Codes screen** opens with all available status codes displayed in a table.
2. Click on the toolbar; in the window that appears, enter the short code description that will represent the full text status code.
3. Click OK and then enter the full status code **description** in the textbox at the bottom of the screen.
4. Click to save and apply your changes. The new status code now displays in the table.

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Editing Status Codes

- To edit the full status code description, click .
- To edit the short code description that represents the full text status code, click .

Outside Agencies

Agency records enable you to track the supportive services that your agency's SPC participants receive. The top portion of the screen contains a table of all outside agencies in the database, while the bottom portion contains the detailed information for the currently selected agency.

Setting Up Outside Agencies

1. Click SETUP on the **Main Menu screen** and then click OUTSIDE AGENCIES on the **Setup Menu screen** that appears. The **Maintain Outside Agencies screen** opens with all available outside agencies displayed in a table.
2. Click on the toolbar.
3. Enter the **name** of the agency, your agency's primary point of **contact** at the outside agency, the agency's full **address**, **telephone** number, **fax number**, **email address**, and **web address**.
4. Click to save and apply your changes. The new outside agency now displays in the table.

- To edit an outside agency, select and highlight it in the table and click .

Caseworkers

Caseworker records enable you to associate a specific caseworker with each participant in Shelter Plus Care's database. The top portion of this screen contains a table of all caseworkers who are currently in the database, while the bottom portion of the sub-screen contains the detailed information for the currently selected caseworker.

Setting Up Caseworkers

1. Click SETUP on the **Main Menu screen** and then click CASE WORKERS on the **Setup Menu screen** that appears. The **Maintain Caseworkers screen** opens with all available caseworkers displayed in a table.
2. Click on the toolbar; in the window that appears, enter the short code description that will represent the full caseworker record.
3. Click OK and then enter the caseworker's **first & last name**, **email address**, and all known phone numbers.
4. Click to save and apply your changes. The new caseworker now displays in the table.

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Editing Caseworkers

- To edit the caseworker record, select and highlight it in the table and then click .
- To edit the short code description that represents the caseworker record, select and highlight it in the table and then click .

Participant Management Overview

The primary purpose of the Shelter Plus Care program is to track the supportive services that individual S+C participants receive from outside agencies.

Moving In Participants

Moving Out Participants

Maintaining Supportive Services

Maintaining Income Information

Moving In Participants

When adding, or moving in, a S + C participant, you need to enter the participant's information, their move in information,and their income information.

1. Click PARTICIPANTS on the **Main Menu screen**. The **Browse Participants screen** opens with all current S + C participants displayed in a table.
2. Click on the toolbar; the **Add Participant Wizard** is initiated.

Enter Participant Info

3. Select the tenant you are adding from the **tenant name** drop-down list and the selected tenant's information displays in the available fields.This list contains all tenants who are in the Occupancy and Rent Calculation program's tenant database in the current data area.

   OR

   To search for the tenant by their first name, click . A window appears with all available tenants displayed. In the **first name** textbox, start typing the tenant's first name. The first tenant to match the name will be highlighted in the table. Select and highlight the appropriate tenant and click OK. The first step of the wizard appears again with the selected tenant's information displayed.
4. When you select a tenant, the program automatically selects the correct **project** number for the tenant, if one is available. If the field remains blank, select the correct project from the drop-down list. (Or, click and search for the project number in the window that appears, select and highlight the correct project, and then click OK to return to the wizard with the selected project number now displayed.)
5. Click START to continue to Step 2.

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Enter Move In Info

6. The program defaults the tenant's **recommended date** (the date on which the tenant was recommended as a S+C participant) and **start date** (the date on which the tenant entered your agency's S+C program) to the current system date. If these dates are incorrect, edit them as necessary.
7. Select the participant's **caseworker** and **status code**, if applicable.
    - These are your agency-defined lists of case workers and status codes, which you maintain in the Setup area of the program. See "Caseworkers" on page 3 and See "Status Codes" on page 2
8. Click NEXT to proceed to Step 3.
9. The program defaults the participant's **move-in date** to today's date. If this date is incorrect, edit it as necessary.
10. If the participant is a **veteran**, check the checkbox.
11. Select the participant's **referral source** (the source that referred the tenant to your agency's S+C program.), **disability** (the problem that led to the participant entering your agency's S+C program), and **prior living situation**.
12. Click NEXT to proceed to Step 4.

Enter Income Info

13. In the table of income types, enter the **income amount** that the participant is receiving from *each* source as of the date of their entry into the S+C program.
14. Click NEXT to proceed to Step 5.
15. Review and confirm the information you have entered for the participant. If you need to make any changes, click BACK to return to the appropriate step.
16. Click FINISH to save and move in/add the participant. The **Maintain Current Participant screen** appears with the newly added participant information displayed on the available tabs. If necessary, you can now complete the following processes:
    - Maintaining Supportive Services
    - Maintaining Income Information
    - Moving Out Participants

Note: After completing an S+C move in, you can edit the new participant's move in information on the Move-Ins/Move-Outs sub-tab. To locate this sub-tab, select the General tab on the Maintain Current Participants screen; the Move-Ins/Move-Outs sub-tab is the middle sub-tab at the bottom of the screen.

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Maintaining Supportive Services

The Supportive Services tab enables you to record every instance of supportive service that the S+C participant receives.

1. Click PARTICIPANTS on the **Main Menu screen**. The **Browse Participants screen** opens with all current S + C participants displayed in a table.
2. Select how you want to order the participant table from the **ordered by** drop-down list, enter the search criteria in the **search for** field and click GO. The first participant to match the criteria is highlighted in the table.
3. Highlight the participant record you want to work with and double-click, or click . The **Maintain Current Participants screen** opens with the **General tab** selected.
4. Select the **Supportive Services tab**. All supportive service information entered for the participant displays in a table.
5. To add a supportive service record, click .

   OR

   To edit an existing supportive service record, select it in the table and click .

Hint: *To delete an existing supportive service record, select it in the table and click* .

6. At the bottom of the screen, specify the **service date** (the date on which the participant received, or began receiving, the service).
7. Select the **agency name** of the outside agency from which the participant received the service.
   - This is your agency-defined list of outside agencies, which you maintain in the Setup area of the program. See "Outside Agencies" on page 3
8. Select the **project number**. This is the housing project in which the tenant was housed at the time they received the service.
9. Enter the **match amount** (value of the service) and then enter any additional **comments**, or details about the service, if necessary.
10. Click to save and apply your changes.

Maintaining Income Information

The Income Details sub-tab enables you to record the move-in and move-out income amounts that the participant is receiving from *each* source as of the date of their entry and/or exit into the S+C program.

1. Click PARTICIPANTS on the **Main Menu screen**. The **Browse Participants screen** opens with all current S + C participants displayed in a table.

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2. Select how you want to order the participant table from the **ordered by** drop-down list, enter the search criteria in the **search for** field and click GO. The first participant to match the criteria is highlighted in the table.
3. Highlight the participant record you want to work with and double-click, or click . The **Maintain Current Participants screen** opens with the **General tab** selected.
4. Select the **Income Detail sub-tab** at the bottom of the screen. This sub-tab contains a table of all income categories that must be recorded when a participant enters and leaves S+C.
5. Click and enter the **move-in amount** and/or **move-out amount** that the participant is receiving from *each* source as of the date of their entry and/or exit into the S+C program.
6. Click to save and apply your changes.

Hint: *You can also terminate a tenant's participation in S+C on this tab using the* *icon on the toolbar. See "Moving Out Participants" on page 7*

Moving Out Participants

Use the Move Out Participants wizard to record the end of a tenant's S+C participation. This wizard can be accessed on the General tab of the Maintain Current Participants screen, as well as the Participant Information, Move-Ins/Move-Outs, and Income Detail sub-tabs of the General tab.

1. Click PARTICIPANTS on the **Main Menu screen**. The **Browse Participants screen** opens with all current S + C participants displayed in a table.
2. Select how you want to order the participant table from the **ordered by** drop-down list, enter the search criteria in the **search for** field and click GO. The first participant to match the criteria is highlighted in the table.
3. Highlight the participant record you want to work with and double-click, or click . The **Maintain Current Participants screen** opens with the **General tab** selected.
4. Click on the toolbar of any sub-tab of the General tab; the **Move Out Participants Wizard** is initiated.
5. Specify the participant's **move out date** (default's to today's date).
6. Select the participant's move out **reason** and their **destination** for which the participant left your agency's S+C program.
7. Click START to continue.
8. In the table of income types, enter the **income amount** that the participant is receiving from *each* source as of the date of exit from the S+C program.
9. Click NEXT to continue.
10. Review and confirm the information you have entered for the participant. If you need to make any changes, click BACK to return to the appropriate step.

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11. Click FINISH to save and move out the participant. The **Maintain Current Participant screen** appears with the information of the next current participant in the data area displayed.

Hint: *To view the newly moved out participant's information, return to the Browse Participants screen and select "History Participants" from the* ***View*** *drop-down list at the top of the screen. All tenant's with terminated S+C participation will then display in the table.*

Note: After completing an S+C move out, you can edit the participant's move out information on the Move-Ins/Move-Outs sub-tab. To locate this sub-tab, select the General tab on the Maintain Current Participants screen; the Move-Ins/Move-Outs sub-tab is the middle sub-tab at the bottom of the screen.

Reports Overview

Shelter Plus Care includes many built-in reports with powerful filters to help track and manage your data. If your agency uses the Custom Report Writer program, you can create custom reports and define who has rights to run them.

You can manage your reports by choosing from many report options and by previewing or printing reports. You can also save reports as various file types.

Access Reports

1. Click REPORTS on the **Main Menu screen**; the **Shelter Plus Care Reports screen** appears with the **General tab** selected.
2. Select the radio button of the report you want to work with. Filter options for the report display on the right side of the screen and toolbar icons become available. Following are the summaries of the reports found on the Shelter Plus Care Reports screen:
    - General Report Summaries

Preview or Print Reports

3. Once you have filtered and sorted the report to your needs, you can click on the toolbar to preview the report in a separate window. Or, click to print a hard copy of the report.

Note: On the Print Preview screen, you can click ***to save the report to your files, click*** ***to load the report, and use the Zoom icons*** ***to zoom in or out to your preference. If the report has multiple pages, use the arrows*** ***to navigate through the pages.***

General Report Summaries

Participant List by Agency lists each outside agency in your Shelter Plus Care database, along with the participants who have received supportive services from it. You can filter this report to include all participants or only current participants; to include only participants in a single

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project; to include only a single outside agency; and/or to include only participants who were active within a certain range of dates.

Participant List by Project lists participants in your Shelter Plus Care database, grouped by project. You can filter this report to include only participants in a single project; and/or to include only participants who were active within a certain range of dates.

Housing Assistance Listing lists participants in your Shelter Plus Care database who were active in your agency's SPC program as of the last day of the previous fiscal year. You can filter this report to include only participants in a single project; and/or to include only participants who were active within a certain range of dates.

Referral Source Listing lists participants in your Shelter Plus Care database, grouped by referral source. You can filter this report to include only participants in a single project; to include only participants with a specific referral source; and/or to include only participants who moved in within a certain range of dates.

Age/Gender/Race Listing provides a statistical breakdown of the name, age, gender, and race of all participants in your Shelter Plus Care database who were active within a selected range of dates. You can filter this report to include only participants in a single project.

Primary Disability Listing provides a statistical breakdown of the primary disability type, if any, of all participants in your Shelter Plus Care database who were active within a selected range of dates. You can filter this report to include only participants in a single project.

Prior Living Situation Listing provides a statistical breakdown of the prior living situation of all participants in your Shelter Plus Care database who moved in within a selected range of dates. You can filter this report to include only participants in a single project.

Length of Stay Listing provides a statistical breakdown of the length of SPC participation of all participants who moved out within a certain range of dates. You can filter this report to include only participants in a single project.

Reason For Leaving Listing provides a statistical breakdown of the reason for leaving of all participants who moved out within a certain range of dates. You can filter this report to include only participants in a single project.

Destination Listing provides a statistical breakdown of the move-out destination of all participants who moved out within a certain range of dates. You can filter this report to include only participants in a single project.

Veterans Listing lists all participants who are veterans. You can filter this report to include only participants in a single project; and/or to include only participants who were active within a selected range of dates.

Monthly Income Listing provides a statistical breakdown of the move-in or move-out income amounts of all participants in your Shelter Plus Care database. You can filter this report to include only participants in a single project; and/or to only include participants who moved in or moved out within a selected range of dates.

Income Source Listing provides a statistical breakdown of the move-in or move-out income sources of all participants in your Shelter Plus Care database. You can filter this report to include

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only participants in a single project; and/or to only include participants who moved in or moved out within a selected range of dates.

About Tenmast Software

Company Information

Tenmast is an established leader in providing excellent software and expert support to the public housing industry. We produce software for managing tenant and financial data, tracking maintenance activities, performing unit inspections, and producing standard HUD and agency-specific reports and data reporting files. We have been automating housing authorities across the United States since 1985.

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